

## MONEY

Money Dashboard Location	New Financial Dashboard Location
Account, Account Summary and Fund Reports	<b>State:</b> State Funds > State – Summary <b>RF:</b> Research Foundation Funds > RF – Summary <b>UBF:</b> UB Foundation Funds > UBF – Summary
Fund Summary	Fund Summary > Fund – Funding Source
Line	Account Summary > Account Summary – Summary
Budget Revisions	State Funds > State – Personal Service
OEC and FTE	State Funds > State – Allocation
	<b>State:</b> State Funds > State – Account Summary <b>RF:</b> Research Foundation Funds > RF – Grant Summary <b>FTE Summary:</b> State Funds > State – Personal Service
Fees	State Funds > State – IFR/SUTRA
IFR Salary Summary	State Funds > State – IFR Salary Recovery
Reports and Information	Financial Home Page

## ACCOUNT MANAGEMENT

Account Management Dashboard Location	New Financial Dashboard Location
Action Items	Financial Home Page > Alerts
Links	Financial Home Page > Forms and Links
Percent of Allocation	Financial Home Page > Supplemental Reports
Projected Accounts in the Red	Financial Home Page > Alerts
Budget Status	<b>State:</b> State Funds > State – Summary <b>RF:</b> Research Foundation Funds > RF – Summary <b>UBF:</b> UB Foundation Funds > UBF – Summary
Budget Revisions	State Funds > State Allocation
PSR Balance	Financial Home Page > Alerts
Revenue	State Funds > State IFR / SUTRA
Open Encumbrances	<b>State:</b> State Funds > State – Non-Personal Service <b>RF:</b> Research Foundation Funds > RF – Grant Expenditures
Payroll Audit	Financial Homepage > Alerts and Supplemental Reports
Line Maintenance	* This report can be found on the Staff Management dashboard.
Information	Financial Home Page

## Glossary of Terms

**Operational Data** - Data Reported based on the business rules of the source business system.

**Strategic Data** - Data reported utilizing business rules designed by UB business offices to better define and report financial data. For example, IFR Fringes are stored as contra-revenue in the State financial system but reported as an expense in the UB Strategic data.

**Actuals** - Expenses that have been processed and is applied to UB accounts. Actuals **DO NOT** include encumbrances.

**Sources** - Revenues and allocations used for purchases, staff payrolls, etc. It is comprised of revenue for revenue-based accounts like IFR, SUTRA and UB Foundation accounts; budget for Research Foundation accounts and fiscal allocation for allocation-based accounts like State Operating.

**Uses** - Expenditures plus encumbrances applied to UB accounts.

**Available** - Sources minus uses.

## Customizing Reports

Right click any field to:

- Sort your data
- Show subtotals
- Show row level grand totals
- Include and exclude columns
- Reorder columns
- Move columns to other areas (prompts or selections)

Sort Column	▶
Keep Only	▶
Remove	▶
Show Subtotal	▶
Show Row level Grand Total	▶
Exclude Column	▶
Include Column	▶
Move Column	▶





## STRATEGIC FINANCIAL

Strategic Financial Dashboard Location	New Financial Dashboard Location
All Funds Summary Report	Fund Summary > Fund - Funding Source
Campus Financial Plan	* This report can be found on the Commitment Management dashboard.
Trend	Trend > Trend - Fund
	Trend > Trend - Organization
Unit Profile	Fund Summary > Fund - UB Code
	Fund Summary > Fund - Funding Source
Expenditures	Fund Summary > Fund - UB Code
Fees	State Funds > State - IFR / SUTRA
Operating Reports	Operating Reports > Operating Statement
	Operating Reports > Operating Sources
	Operating Reports > Operating Uses
	Fund Summary > Fund - NACUBO
Information	Financial Home Page

## MONEY MANAGEMENT

Money Management Dashboard Location	New Financial Dashboard Location
Reports	<b>State:</b> State Funds > State - Account Summary State Funds > State - Non-Personal Service
	<b>RF:</b> Research Foundation Funds > RF - Grant Summary
	<b>UBF:</b> UB Foundation Funds > UBF - Fund Summary
	<b>IFR:</b> State Funds > State - IFR / SUTRA
	<b>Line:</b> State Funds > State - Personal Service
Current Condition	* A selection of these reports can be found on the Procurement dashboard.
State Summary, Allocation and Expenditures	State Funds > State - Account Summary
State PSR	State Funds > State - Personal Service
State Temporary Service	State Funds > State - Personal Service
State IFR Summary	State Funds > State - IFR / SUTRA
IFR Salary Recovery	State Funds > State - IFR Salary Recovery
State Checkbook	State Funds > State - Checkbook
RF Summary	Research Foundation Funds > RF - Grant Summary
RF Expenditures	Research Foundation Funds > RF - Grant Expenditures
UBF Summary	UB Foundation Funds > UBF - Summary
UBF Expenditures	UB Foundation Funds > UBF - Expenses

## Frequently Asked Questions

### Q. How do I fix data that isn't displaying correctly?

- Refresh the page:** Click the **gear icon** in the upper right and then click **Refresh**.
- Clear any customizations:** Click the **gear icon** and then click **Clear My Customization**.

If the above steps don't work, submit a ticket in the Business Services Support Hub.

### Q. How do I find missing columns that were on the previous dashboard?

- On any SIRI dashboard, right-click a column heading to open the customization menu.
- From there, you can access additional options; many have expanded settings available via the submenu.

### Q. How do I save my dashboard customization?

- Set up the dashboard page:**
  - Apply your desired filters.
  - Adjust the column display (include/exclude, reorder, add subtotals, etc.).
  - Click **Apply** to view the changes.
- Save the customization:**
  - Click the **gear icon** and then click **Save Customization** to store your current setup.
  - Type a name for easy reference.
- Apply or Set as Default:**
  - You may apply a saved customization anytime.
  - Optionally, you may set it as your default view for that dashboard page.

### SIRI Resources

Looking for additional resources about SIRI? Visit the SIRI website!

[buffalo.edu/siri](https://buffalo.edu/siri)

Contact the Business Reporting and Systems SIRI Team

For special report requests, modifications to existing reports or dashboards or questions about the SIRI Tool or the data, please submit a ticket in the Business Services Support Hub.

[ubuffalo.teamdynamix.com/TDClient/49/Portal/Home/](https://ubuffalo.teamdynamix.com/TDClient/49/Portal/Home/)

